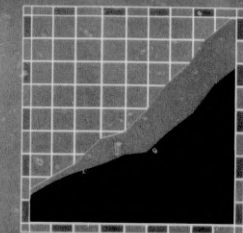


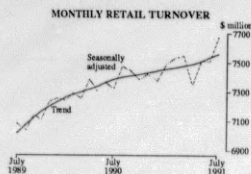
Statistics Weekly

Thursday, 19 September 1991

The week in statistics ...

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Retail activity improves slightly

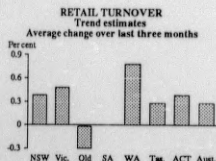
The trend estimates of turnover for retail and selected service establishments show a slight improvement. The increase over the 3 months ended July 1991 averaged 0.3 per cent per month. The average monthly increase for the three months ended April 1991 was 0.2 per cent.

The annual growth rate (July 1991 over July 1990) has risen to 2.4 per cent, an average monthly increase of 0.2 per cent.

The increase in the trend estimates is partly influenced by the number of sales held in July, particularly in the clothing store and department store industries. Improved trading was also shown in the grocery industry. Industries showing strong growth include domestic hardware/jewellers, pharmacies, and newsagents. The trend estimates for hotels, licensed clubs and liquor stores show very weak growth in this industry.

RETAIL TURNOVER

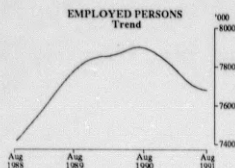
| | Original value in July 1991 \$ million | Percentage change in trend estimates | |
|---------------------------------------|---|--|--------------------------|
| | | Average monthly increase for 3 months to July 1991 | July 1991 over July 1990 |
| Pharmacies | 362 | 3.4 | 20.3 |
| Grocers, confectioners, tobacconists | 2,185 | 0.4 | 6.9 |
| Domestic hardware, jewellers | 206 | 1.8 | 6.2 |
| Clothing and fabrics stores | 592 | 0.3 | 4.3 |
| Newsagents | 269 | 1.4 | 1.7 |
| Department and general stores | 787 | 0.3 | -0.5 |
| Hotels, liquor stores, licensed clubs | 918 | 0.1 | -1.7 |
| Electrical stores | 439 | -0.8 | -5.2 |
| Other industries | 1,717 | n.a. | n.a. |
| All industries | 7,474 | 0.3 | 2.4 |



As shown in the table below retail turnover for Western Australia is showing strong growth while New South Wales, Victoria and Tasmania are experiencing moderate to weak growth. There is no growth evident in retail turnover for South Australia, and Queensland is in decline.

RETAIL TURNOVER BY STATE Percentage change in trend estimates

| | NSW | Vic. | Qld | SA | WA | Tas. | ACT | Aust. |
|--------|-----|------|------|------|-----|------|-----|-------|
| 1991 — | | | | | | | | |
| March | 0.4 | 0.1 | 0.0 | 0.0 | 0.1 | 0.2 | 1.3 | 0.2 |
| April | 0.4 | 0.2 | -0.1 | -0.1 | 0.4 | 0.2 | 0.9 | 0.2 |
| May | 0.4 | 0.4 | -0.3 | -0.1 | 0.7 | 0.2 | 0.6 | 0.3 |
| June | 0.5 | 0.5 | -0.3 | 0.0 | 0.9 | 0.4 | 0.4 | 0.4 |
| July | 0.3 | 0.5 | -0.3 | 0.0 | 0.9 | 0.2 | 0.1 | 0.3 |



Employment rises sharply in August

Strong rises in employment for males and females in August 1991 (seasonally adjusted) outweighed the large fall in employment recorded between June and July. The unemployment rate was steady, while the labour force participation rate rose sharply.

The seasonally adjusted estimate of employed persons increased by 106,000 in August 1991 to 7,728,600. The increase was the result of rises in both full-time employment (up 86,500) and part-time employment (up 19,500). Male employment rose by 48,100, made up of increases of 35,400 in full-time employment and 12,700 in part-time employment. For females, employment rose by 57,900, with increases of 51,100 in full-time employment and 6,800 in part-time employment.

The seasonally adjusted estimate of unemployed persons increased by 8,600 to 840,500 in August 1991. Male unemployment rose to 515,500, the highest level recorded by the monthly survey, mainly as a result of an increase of 14,200 in the number of males seeking full-time work. For females, unemployment fell by 6,100 to 325,000, with a fall of 9,800 in those seeking full-time work.

The unemployment rate in August 1991 (seasonally adjusted) was steady at 9.8 per cent. For males, the unemployment rate rose by 0.2 percentage points to 10.3 per cent. For females the unemployment rate fell by 0.3 percentage points to 9.1 per cent.

In August 1991, the seasonally adjusted estimate of the labour force participation rate rose by 0.8 percentage points to 63.4 per cent. For males, the participation rate rose by 0.9 percentage points to 74.9 per cent. For females, the participation rate rose by 0.7 percentage points to 52.2 per cent.

LABOUR FORCE SURVEY ESTIMATES
Seasonally adjusted

| | Employed | | | Un- employed | Unemploy- ment rate — per cent — | Participa- tion rate |
|--------|----------------------|----------------------|---------|-----------------|---|----------------------------|
| | Full-time workers | Part-time workers | Total | | | |
| | — '000 — | | | | | |
| 1991 — | | | | | | |
| April | 5,996.4 | 1,724.6 | 7,721.0 | 844.0 | 9.9 | 63.7 |
| May | 6,001.9 | 1,713.1 | 7,715.0 | 803.6 | 9.4 | 63.2 |
| June | 5,985.6 | 1,720.2 | 7,705.7 | 793.0 | 9.3 | 63.0 |
| July | 5,919.5 | 1,703.0 | 7,622.6 | 831.9 | 9.8 | 62.6 |
| August | 6,006.1 | 1,722.5 | 7,728.6 | 840.5 | 9.8 | 63.4 |

For further information, order the publication *The Labour Force, Australia*, Preliminary (6202.0), or contact Don Clark (06) 252 6525.

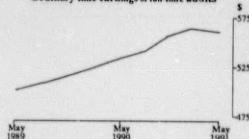
Average weekly earnings decline

Final estimates for May 1991 show a decrease in average weekly ordinary time earnings of 0.6 per cent for full-time adults to \$560.80, down from \$564.20 in February 1991.

The decrease in ordinary time earnings for full-time adult males was 1.0 per cent (to \$592.00) while full-time adult females showed a small increase of 0.1 per cent (to \$500.50).

Continued ...

AVERAGE WEEKLY EARNINGS
Ordinary time earnings of full-time adults



AVERAGE WEEKLY EARNINGS, MAY 1991
Ordinary time earnings of full-time adults

| | Weekly earnings (\$) | | | Percentage change in 'Persons' from | |
|------------------------------|----------------------|---------|---------|-------------------------------------|----------|
| | Males | Females | Persons | February 1991 | May 1990 |
| New South Wales | 600.40 | 503.60 | 567.30 | -2.3 | 3.6 |
| Victoria | 594.20 | 507.20 | 564.10 | -0.2 | 5.2 |
| Queensland | 560.60 | 475.10 | 532.30 | 1.3 | 5.7 |
| South Australia | 566.90 | 501.90 | 546.40 | 0.0 | 6.5 |
| Western Australia | 613.90 | 497.20 | 573.80 | 1.3 | 8.1 |
| Tasmania | 563.60 | 477.90 | 536.30 | -0.2 | 3.1 |
| Northern Territory | 615.60 | 522.00 | 579.30 | 0.9 | 5.8 |
| Australian Capital Territory | 684.20 | 548.20 | 630.60 | -0.1 | 5.6 |
| Australia | 592.00 | 500.50 | 560.80 | -0.6 | 5.0 |

Average weekly total earnings for full-time adults decreased by 1.0 per cent to \$591.70 during the quarter, producing an annual increase of 3.9 per cent compared with May 1990.

Factors affecting the estimates include the slow down in the compositional changes due to the shedding of lower paid staff and the increasing proportion of other employees (part-time adults and juniors) in the workforce.

For further information, order the publication *Average Weekly Earnings, States and Australia* (6302.0), or contact Mick Atkinson (06) 252 6571.

Housing starts show modest improvement in June quarter

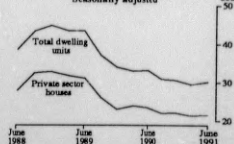
Total dwelling unit commencements increased in the June quarter 1991 following falls in the previous three quarters. Increases were recorded in both private and public sector commencements.

In seasonally adjusted terms, the number of dwelling units commenced in the June quarter 1991 (30,190) increased by 2.4 per cent over the March quarter 1991 estimate of 29,480 but the number was 8.9 per cent lower than the June quarter 1990 estimate of 33,150.

In original terms, the total number of dwelling units commenced in the June quarter 1991 was 30,090, 9.7 per cent higher than the March quarter 1991 figure of 27,420. Increases were recorded in all States and Territories except South Australia, which decreased marginally, and the Northern Territory which remained unchanged.

Continued ...

DWELLING UNITS COMMENCED
Seasonally adjusted



Nationally, there were 121,260 dwellings commenced during 1990-91, nearly 12 per cent down on the 137,700 commencements recorded during 1989-90 and well below the 1988-89 estimate of 174,960.

DWELLING UNIT COMMENCEMENTS June Quarter 1991

| | Private sector houses | | Total dwelling units | |
|---------------------|-----------------------|---------------------------------------|----------------------|---------------------------------------|
| | Number | Percentage change on previous quarter | Number | Percentage change on previous quarter |
| Original | 21,830 | 9.3 | 30,090 | 9.7 |
| Seasonally adjusted | 21,530 | 0.7 | 30,190 | 2.4 |

For further information, order the publication *Building Activity, Australia: Dwelling Unit Commencements, Preliminary (8750.0)*, or contact Paul Seville on (06) 252 6067.

Established house prices rise but new homes get cheaper

Prices of established houses increased in all capital cities except Adelaide and Perth between the March and June 1991 quarters, with a rise of 1.2 per cent in the Australian index for established house prices over that period.

Movements in established house prices in recent times have varied significantly between cities. In the year to June quarter 1991 the index for Perth fell by 6 per cent, while the index for Brisbane rose by 13.6 per cent. Quarterly movements for Perth were negative for the last six quarters, while the Brisbane index rose for each of the six quarters, with increases in the range 2.9 to 3.8 per cent.

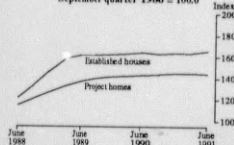
HOUSING PRICES, JUNE QUARTER 1991 Percentage change

| Period | Established houses | | Project homes | |
|-----------|-----------------------|---|-----------------------|---|
| | From previous quarter | From corresponding quarter of previous year | From previous quarter | From corresponding quarter of previous year |
| 1990 — | | | | |
| September | -0.9 | 0.8 | 0.6 | 3.1 |
| December | 0.7 | 1.1 | 0.7 | 2.6 |
| 1991 — | | | | |
| March | -0.1 | 0.5 | 0.1 | 2.0 |
| June | 1.2 | 0.8 | -0.6 | 0.8 |

The Australian index for project home prices fell by 0.6 per cent between the June and March quarters 1991. This is the first quarterly decrease since the index has been compiled.

For further information, order the publication *House Price Indexes: Eight Capital Cities (6416.0)*, or contact Ian Buchanan on (06) 252 5754.

HOUSING PRICES
September quarter 1986 = 100.0



Inquiries

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Any suggestions for improvement to this publication should be addressed to:

Robert Nixon
Editor
Statistics Weekly
(06) 252 6104

Statistics Weekly
19 September 1991

All the week's releases: 11 to 17 September

General

Publications Issued in August 1991 (1102.0; \$5.50)
Publications Advice, 17 September 1991 (1105.0; free)
Australian Bureau of Statistics Publications to be Released in 1992 (1109.0; free)
Monthly Summary of Statistics, Aust., September 1991 (1304.0; \$19.00)
Statistics Weekly, 12 September 1991 (1318.0; \$4.00)
Summary of Statistics, NT, June Qtr 1991 (1305.7; \$8.50)
Northern Territory Business Indicators, September 1991 (1307.7; \$4.00)
(Previously: Territory Business Indicators)

Census of Population and Housing

1991 Census — A Guide to Products and Services, 1991 (2910.0; free)
— *new issue*

Demography

Australian Demographic Statistics, March Qtr 1991 (3101.0; \$11.50)
Overseas Arrivals and Departures, Aust., April 1991 (3401.0; \$6.00)

Social statistics

Public Hospital Morbidity, Vic., 1989-90 (4301.2; \$7.00)
Schools, Qld, 1990 (4221.3; \$10.00) — *final issue*
Court Statistics: Children's Courts, WA, 1988-89 (4503.5; \$12.50)
— *final issue*

National accounts, finance and foreign trade

Foreign Investment, Aust., 1989-90 (5305.0; \$35.00)
Foreign Trade, Aust., Merchandise Imports, July 1991 (5433.0; \$9.00)

Labour statistics and prices

The Labour Force, Aust., August 1991, Preliminary (6202.0; \$10.00)
The Labour Force, Aust. — Preliminary Data on Floppy Disk, August 1991 (6271.0; \$65.00)
Average Weekly Earnings, States and Aust., May 1991 (6302.0; \$10.00)
Award Rates of Pay Indexes, Aust., July 1991 (6312.0; \$10.00)
Price Indexes of Copper Materials, Aust., August 1991 (6410.0; \$5.00)
Price Indexes of Materials Used in Coal Mining, Aust., July 1991 (6415.0; \$10.00)

Secondary industry and distribution

Retail Trade, Aust., July 1991 (8501.0; \$10.00)
Sales of Australian Wine and Brandy by Winemakers, July 1991 (8504.0; \$10.00)
Building Activity, Aust.: Dwelling Unit Commencements, June Qtr 1991, Preliminary (8750.0; \$10.00)
Estimated Dwelling Stocks, WA, June 1991 (8705.5; \$18.00)
Building Approvals — Private Sector, Perth Statistical Division, August 1991 (8732.5; \$3.50)
Building Approvals, Tas., July 1991 (8731.6; \$9.50)
Dwelling Unit Commencements Reported by Approving Authorities, Queensland, June 1991 (8741.3; \$10.00)
Tourist Accommodation, NT, June Qtr 1991 (8635.7; \$10.00)

Transport

TRANSTATS, February 1991 (9312.0; \$1,000.00) — *new issue*
Motor Vehicle Registrations, Tas., July 1991 (9303.6; \$5.00)
Road Traffic Accidents Involving Casualties, Tas., June Qtr 1991 (9405.6; \$6.50)

Calendar of key releases

Expected releases over the fortnight to 1 October 1991

September

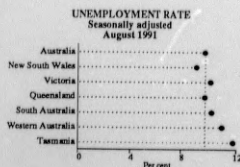
- 18** Quarterly Indexes of Industrial Production, Australia, June Quarter 1991 (8125.0; \$10.00)
- 23** Export Price Index, Australia, July 1991 (6405.0; \$7.50)
- 25** Manufacturing Production, Australia, August 1991, Preliminary (8301.0; \$10.00)
- 26** Job Vacancies and Overtime, Australia, August 1991 (6354.0; \$11.50)
- Price Index of Materials Used in Building Other Than House Building, Eight Capital Cities, July 1991 (6407.0; \$10.00)
- Price Index of Materials Used in House Building, Six State Capital Cities and Canberra, July 1991 (6408.0; \$7.50)
- Registrations of New Motor Vehicles, Australia, August 1991, Preliminary (9301.0; \$10.00)
- 27** Housing Finance for Owner Occupation, Australia, July 1991 (5609.0; \$10.00)
- Price Indexes of Materials Used in Manufacturing Industries, Australia, July 1991 (6411.0; \$10.00)
- Price Indexes of Articles Produced by Manufacturing Industry, Australia, July 1991 (6412.0; \$10.00)

October

- 1** Balance of Payments, Australia, August 1991 (5301.0; \$15.00)

The latest ...

Changes to key State indicators — consolidated to 17 September 1991



| | NSW | Vic. | Qld | SA | WA | Tas. | NT | ACT | Aust. |
|--|-------|-------|-------|-------|-------|-------|-------|------|-------|
| — Percentage change from same period previous year — | | | | | | | | | |
| New capital expenditure (Mar. qtr 91)* | -8.4 | -22.7 | 0 | -8.9 | -7.0 | -16.9 | n.a. | n.a. | -10.2 |
| Retail turnover (July 91) (trend estimate) | 2.4 | 1.0 | 2.5 | 5.8 | 2.6 | 4.1 | n.a. | 8.4 | 2.4 |
| New motor vehicle registrations (July 91)† | -15.7 | -41.8 | -17.7 | -11.9 | -1.6 | -8.1 | -16.1 | 18.0 | -20.9 |
| Number of dwelling unit approvals (July 91) | 26.5 | 11.3 | 13.6 | 7.3 | 16.3 | -6.3 | 66.7 | 77.6 | 17.3 |
| Value of total building work done (Mar. qtr 91) | 0.8 | -30.2 | -19.5 | 2.7 | -23.2 | -18.8 | 33.5 | -4.2 | -13.5 |
| Employed persons (Aug. 91)* | -0.7 | -4.9 | -1.0 | -3.4 | -0.7 | -1.9 | 7.7 | 2.3 | -2.0 |
| Capital city consumer price index (June qtr 91) | 2.8 | 4.1 | 3.4 | 4.7 | 2.2 | 3.8 | 4.1 | 3.2 | 3.4 |
| Average weekly earnings (full-time adult ordinary time) (May 91) | 3.6 | 5.2 | 5.7 | 6.5 | 8.1 | 3.1 | 5.8 | 5.6 | 5.0 |
| Population (Dec. 90) | 1.1 | 1.3 | 2.3 | 1.1 | 2.2 | 1.1 | 1.2 | 2.5 | 1.5 |
| Room nights in licensed hotels and motels, etc (Mar. qtr 91) | 0.0 | -1.9 | -0.9 | -6.4 | -1.2 | 7.7 | 0.2 | 14.5 | -0.5 |

* Seasonally adjusted except for NT and ACT. † Seasonally adjusted except for Tas., NT and ACT.

The latest ...

8

Key national indicators – consolidated to 17 September 1991

| | | | Latest figure available | | Percentage change (a) on | | |
|--|------------------|-----|-------------------------|----------|--------------------------|-----------------|--------------------------------|
| | | | Period | Original | Seasonally adjusted | Previous period | Corresponding period last year |
| National production | | | | | | | |
| Gross domestic product | — current prices | \$m | June qtr 91 | 92,362 | 93,956 | -1.2 | -1.2 |
| | — 1984-85 prices | " | " | 62,148 | 63,912 | -1.0 | -2.4 |
| Industrial activity | | | | | | | |
| New capital expenditure | — current prices | \$m | June qtr 91 | 6,304 | 6,011 | -8.9 | -13.4 |
| | — 1984-85 prices | " | " | 4,808 | 4,577 | -8.2 | -13.4 |
| Expected new capital expenditure | " | " | Six months to Dec 91 | 12,756 | n.a. | n.a. | -18.5 |
| Retail turnover | — current prices | " | July 91 | 7,060.6 | 7,509.9 | 2.2 | 4.8 |
| | — 1984-85 prices | " | June qtr 91 | 14,569.4 | 15,058.0 | -1.0 | -2.2 |
| New motor vehicle registrations | " | no. | July 91 | 46,421 | 42,794 | 3.6 | -20.9 |
| Dwelling unit approvals | " | " | July 91 | 12,740 | 12,024 | 17.8 | 13.5 |
| Value of all building approvals | " | \$m | " | 1,907 | 1,989 | 16.9 | 11.5 |
| Value of total building work done | — current prices | " | Mar. qtr 91 | 6,021 | 6,653 | -5.1 | -12.0 |
| | — 1984-85 prices | " | " | 3,789 | 4,112 | -6.9 | -15.0 |
| Manufacturers' sales | — current prices | " | Mar. qtr 91 | 31,937 | 34,424 | -1.9 | -4.7 |
| | — 1984-85 prices | " | " | 22,162 | 23,833 | 1.5 | -7.0 |
| Expected manufacturers' sales | " | " | Three months to June 91 | 34,850 | n.a. | n.a. | -6.2 |
| Labour | | | | | | | |
| Employed persons | '000 | " | Aug. 91 | 7,669.2 | 7,728.6 | -1.4 | -2.0 |
| Unemployment rate † | % | " | " | 9.5 | 9.8 | 0.0 | 2.6 |
| Participation rate † | " | " | " | 62.7 | 63.4 | 0.8 | -0.6 |
| Job vacancies | '000 | " | May 91 | 25.1 | 25.7 | -13.4 | -49.8 |
| Average weekly overtime per employee | hours | " | " | 1.1 | 1.1 | -5.9 | -18.8 |
| Prices, profits and wages | | | | | | | |
| Consumer price index | 1980-81 = 100.0 | " | June qtr 91 | 214.4 | n.a. | 0.1 | 3.4 |
| Price index of materials used in manufacturing industries | 1984-85 = 100.0 | " | June 91 | 120.4 | n.a. | 2.2 | 3.3 |
| Price index of articles produced by manufacturing industry | 1988-89 = 100.0 | " | May 91 | 110.8 | n.a. | 0.3 | 1.8 |
| Company profits before income tax | \$m | " | June qtr 91 | 2,469 | 2,697 | 7.4 | -23.1 |
| Average weekly earnings (Full-time adults; ordinary time) | \$ | " | May 91 | 560.80 | n.a. | -0.6 | 5.0 |
| Interest rates (b) (monthly average) | | | | | | | |
| 90-day bank bills † | % per annum | " | June 91 | 10.50 | n.a. | 0.15 | -4.60 |
| 10-year Treasury bonds † | " | " | " | 11.15 | n.a. | 0.40 | -2.25 |
| Balance of payments | | | | | | | |
| Exports of merchandise | \$m | " | July 91 | 4,591 | 4,604 | 2.1 | 5.1 |
| Imports of merchandise | " | " | " | 4,572 | 4,234 | 6.6 | 2.0 |
| Balance on merchandise trade (c) | " | " | " | 19 | 370 | -31.1 | 63.0 |
| Balance of goods and services (c) | " | " | " | -430 | 60 | -80.2 | n.a. |
| Balance on current account (c) | " | " | " | -1,526 | -1,079 | -6.2 | -2.1 |
| Terms of trade (d) | 1984-85 = 100.0 | " | June qtr 91 | n.a. | 100.2 | 1.2 | -5.2 |
| Foreign investment | | | | | | | |
| Net foreign debt | \$m | " | 30 June 91 | 130,314 | n.a. | -2.4 | 2.9 |
| Net foreign liabilities | " | " | " | 176,625 | n.a. | 1.6 | 6.6 |
| Exchange rates (monthly average) | | | | | | | |
| SUS | per SA | " | July 91 | 0.7711 | n.a. | 1.4 | -2.7 |
| Trade weighted index | May 1970 = 100.0 | " | " | 60.0 | n.a. | 1.4 | -1.8 |
| Other indicators | | | | | | | |
| Population (resident at end of qtr) | million | " | Mar. 91 | 17.3 | n.a. | 0.4 | 1.5 |
| Overseas visitor arrivals | '000 | " | Apr. 91 | 168 | 184 | 5.4 | -4.1 |

(a) Based on seasonally adjusted figures where available. (b) Source: Reserve Bank of Australia. (c) For percentage changes, a minus sign indicates an increase in the deficit; no sign means a decrease in the deficit or an increase in the surplus. (d) The ratio of the price of goods and services for exports to that for imports.

NOTES: † a change is shown in terms of percentage points. n.a. = not available.

Figures have been taken from a variety of ABS publications. Copies may be obtained from Information Services (see page 6).

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